# Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

October 17, 2024

# Question

When will Section 505 of the Personnel Action Manual (PAM) be updated? It was last updated on 05/21 and there have been numerous changes since that time. Errors are being made because newer specialists are utilizing the PAM as directed and it's no longer correct.

**Answer:** We are currently updating the Personnel Payroll Manual (PPM) with detailed Retirement Account Code information. The updates are going through the review process, and we will release the changes to the PPM as soon as that process is complete. Departments will be able to reference the PPM at that time.

Our team will then begin the process of updating Account Codes in the PAM. We are doing extensive reconciliation, so this will take some time. In the meantime, please reference recent [Personnel Letters](#) for accurate Account Codes.

# CalHR Question

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

We recently found out that employees (EEs) can enroll their dependents over the age of 26 years as a disabled dependent (prior to certification with CalPERS/CalHR) in the Vision Service Plan (VSP) Premier benefit during the Open Enrollment (OE) period. We advised employees to receive disabled dependent approvals through CalPERS prior to dependents turning 26 to continue benefit eligibility as a disabled dependent, and this will allow them to newly enroll dependents during OE. This process is not clear in the Benefits Administration Manual (BAM) or employee-facing pages in CalHR. Unfortunately, these employees did not receive approvals prior to their dependents turning 26 but enrolled in the VSP Premier plan anyway. We contacted VSP and CalHR and learned that there aren't really flags in place preventing enrollments like this from happening. VSP recommended that we have the EE complete the CalHR 774 (premier enrollments) or contact VSP directly (basic enrollments) after seeing the disabled dependent approval letter in the myCalPERS portal. Going forward, how do we ensure this does not happen again if agencies have no control over the VSP self-service feature during OE?

# CalHR Answer to Question

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

**Answer:** CalHR has developed a certification process for Disabled Dependents who are enrolled in dental and/or Premier Vision only that will be processed by the DRV Unit in the Benefits Division. This process is very similar to the CalPERS process for dependents enrolled in health benefits. If employees are needing to certify their dependents for this process, please reach out the DRV@calhr.ca.gov and our staff will walk you through the process. CalHR is working to update both BAM and HR Manual with more information on this new process.

CalHR will also reach out to VSP to further research this situation. It is not the benefit carriers' responsibility to authorize a disabled dependent that must be approved by CalHR or CalPERS disabled dependent certification process. If personnel departments have examples of this happening with any benefit carriers, please send us an email and we will reach out to the carriers directly.

# New Power BI HR Net Vacancy Dashboard

Presenter: Annette McFarland

Contact: [KeyData@calhr.ca.gov](mailto:KeyData@calhr.ca.gov)

# Disbursements Contact Information

- Main Line: 916-445-7789
    - Callback within 48 hours

- Fax: 916-445-5759
- General Inquiries Email: disbgeneral@sco.ca.gov

- Shanel Watts – Swatts@sco.ca.gov
- Hector Garcia-Gonzalez – hgarcia-Gonzalez@sco.ca.gov

- Mailing Address:
- P.O. Box 942850
- Sacramento, CA 94250-5871

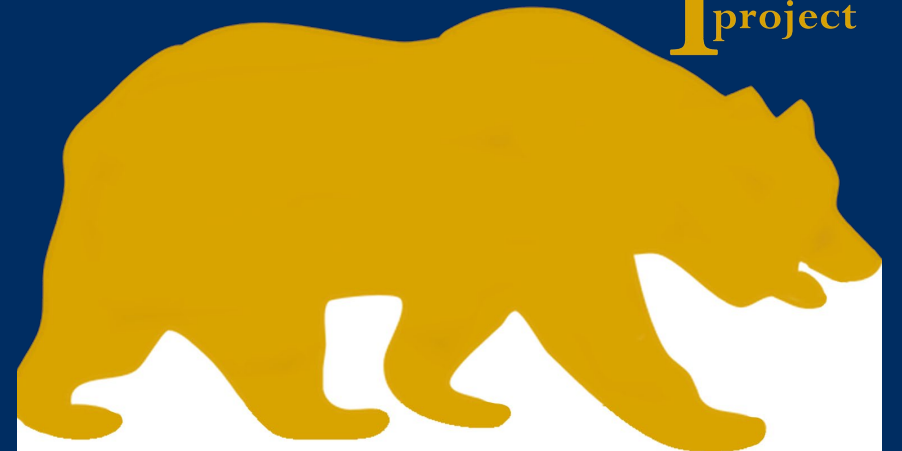- Frequently Asked Questions about Payments Issued by the State Controller's Office

# SCO KEY INITIATIVES

# CSPS Project Update – October 2024
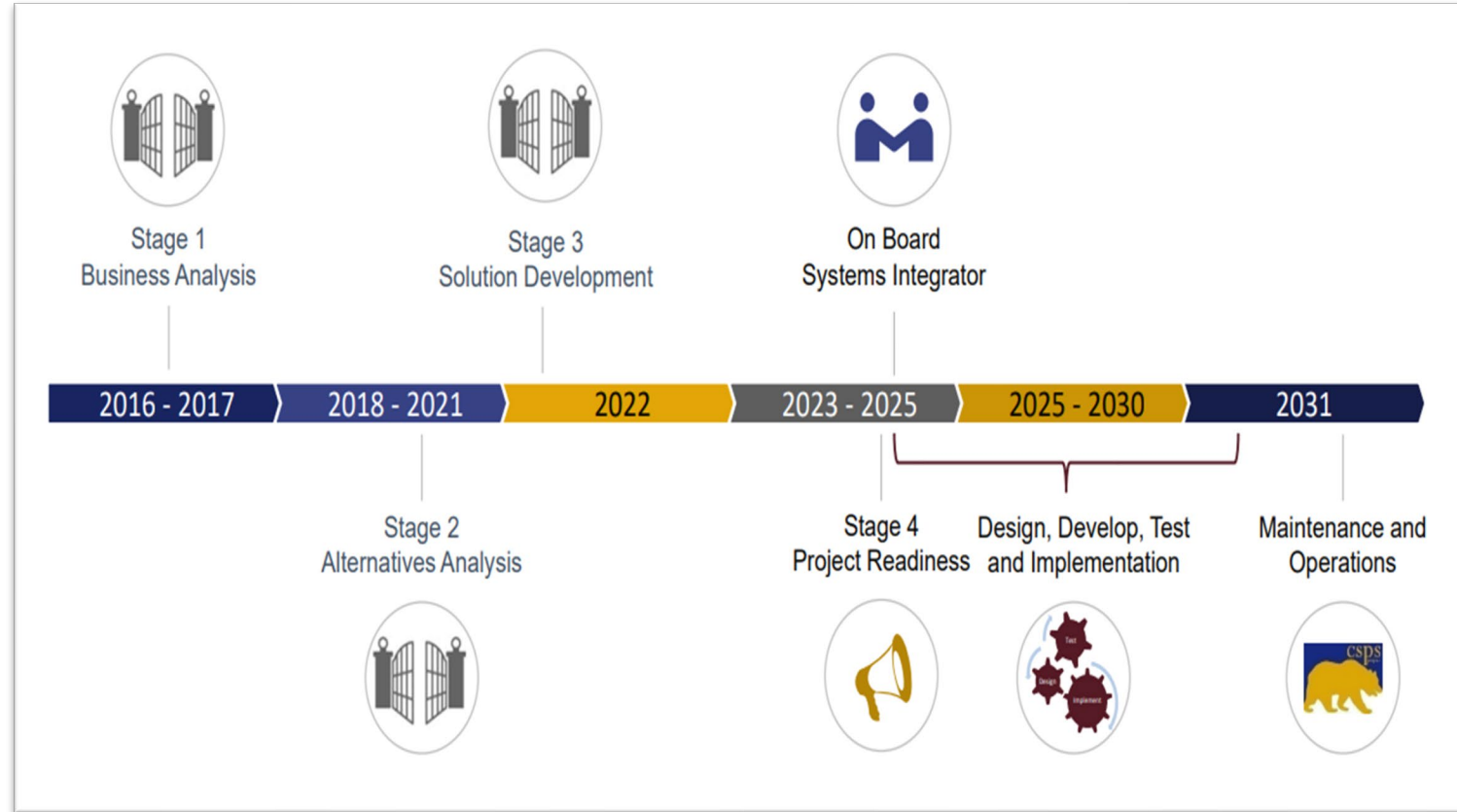
Presenter: Dominick Mullane, ACE
Contact: CSPSHelp@sco.ca.gov

# Project Information:

- **Objective:** To modernize and integrate the State's Human Resource and Payroll systems

- **Goals:** Manager and Employee Self-service, Reduction in manual/paper submissions, Improved reporting capabilities, Efficiencies in processes/workflow

# Project Scope:

- CSPS has defined six (6) Main Business Capabilities (MBCs) to be in-scope of the project.

- Taking a deep dive into each of the six (6) MBCs for the CSPS Project.

- Today we will be covering information on the Payroll MBC.

# Payroll

- Calculate Payroll
- Prepare Payroll Files
- Accumulate Payroll
- Process Payments
- General Payroll

# Status Updates

- **Project Management Office** concluded review sessions for tasks and deliverables from the System Integrator Statement of Work

- **Technical Team** continues to validate information to complete the Interface Diagram

- **Functional Team** continues to analyze Outbound Interface data gathered through the assignment process

- **Organizational Change Management Team** continues to work with Department Agency Readiness Teams to complete the Supplemental Time Off Verification Assignment

# STATEWIDE BENEFITS ADMINISTRATION

# Lump Sum

Presenter: Renee Menefee/Erin Leight

Contact: [Statewide Customer Contact Center](#) (916) 372-7200

**Lump Sum Separation Peak Season Reminders**

- **Refer to [Payroll Letter #24-014](#) for Personnel Action Request (PAR) submission dates**
  - When separating November 1-15, 2024
    - ➤ First PAR must be received at SCO by 11/22/24
    - ➤ Second PAR (if applicable) must be received at SCO between 12/16/24 to 12/24/24
  - When separating November 16-30, 2024
    - ➤ First PAR must be received at SCO by 12/02/24
    - ➤ Second PAR (if applicable) must be received at SCO between 12/16/24 to 12/24/24
  - When separating December 1-31, 2024
    - ➤ First PAR must be received at SCO by 12/13/24
    - ➤ Second PAR (if applicable) must be received at SCO between 12/30/24 to 1/10/25

# Lump Sum

Presenter: Renee Menefee/Erin Leight

Contact: Statewide Customer Contact Center (916) 372-7200

- **ConnectHR Upload Requirements**
  - In the ConnectHR drop-down menu, select CS Audits - Separation PAR Package (Lump Sum)
    - Clearly identify the tax year on the PAR being submitted (i.e., first tax year, second tax year)
    - Do not submit duplicate PARs
  - Refer to ConnectHR email confirmation or ConnectHR upload history to verify PAR submissions

- **Lump Sum Leave Accruals Training Video**
  - Located on the SCO website

# Savings Plus Leave Buy-Back

Presented by: Katie Kerr
Contact: Leaverollover@calhr.ca.gov

# BREAK



# 5 MINUTES

# About the Benefits Division

The Benefits Division is responsible for the design, acquisition, and oversight of the various statewide benefit programs administered by the California Department of Human Resources (CalHR) offered to state employees, retirees and dependents. Our goal is to ensure access to competitive, quality and affordable benefits. Successful delivery of these responsibilities enables the state, as an employer, to offer optimal benefits packages for recruiting and maintaining a top-performing workforce.

# Benefit Programs Reminders

Presenter: Monica Chavez

**CAL HR**
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# Benefit Program Reminders

- CalHR does not have access to update or correct addresses or name changes.

- Prior to submitting enrollment forms, verify the employee's information within the SCO database.

- If the employee's information is incorrect within the SCO database, please follow your agencies policies/rules on correcting the employee's information.

- If the information is correct within the SCO database, and incorrect with the carrier, then the agency's authorized personnel specialist should contact the carrier to correct the information.

- For program specific questions, please email the specific program inbox and not multiple inboxes, as this will ensure the inquiry is getting to the correct Program Staff.

- Prior to sending an inquiry, please review CalHR Websites: Benefits Administration Manual (BAM), HR Manual, Employee Benefits webpage.

- Please remind employees that they should contact their departmental personnel office prior to contacting CalHR.

Presenter: Monica Chavez

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# Benefit Program Updates

CalHR Benefits Division

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# Vision Program Updates

**Program Updates**

- Improving VSP Membership Profiles for Basic Vision:

  o VSP now receives a demographics file for Basic Vision employees.

  o All State of CA employees now have access to Eyeconic, VSP's online store.

- New Vision Handbook posted for Open Enrollment

**Training Recommendations**

- Benefits Administration Manual Training – online CalLearns
- Employee Benefits Orientation Training – online CalHR Webpage

**Benefit Premiums**

- Premiums cannot be waived for months when services are not used.

Presenter: Monica Chavez

Contact:
Vision@calhr.ca.gov

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# FlexElect Program Updates

## Program Updates

- Discontinuation of the "10th of the Month Rule"

  o Effective 8/1/24, CalHR will no longer adhere to the 10th of the month rule for FlexElect/CoBen Cash Options or FlexElect Reimbursement Program.

  o All forms within the posted SCO processing dates on 8/1/24 and forward will also be excluded from the 10th of the month restriction.

- We will be updating the Flex BAM language to match what is in the Flex handbook.

Presenter: Monica Chavez

Contact:
FlexElect@calhr.ca.gov

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# CoBen Cash Updates

## Program Updates

- The 2016 ruling on the Petition to Vacate TRICARE Arbitration – CalHR v. CASE allowed rank and file employees in Bargaining Unit (BU) 2 who are covered under TRICARE to begin receiving the CoBen Cash Option.

- The Benefits Administration Manual, Flex Handbook, and CoBen Handbook were updated to include this information earlier this year, and the information will be updated in the CalHR HR Manual Section 1406 soon. The BU 2 contract language has not been updated

- This is a change for 6/1/2024 moving forward and personnel offices do not need to offer appeals to employees.

- Any retroactive enrollments will require an appeal, which must be approved by CalHR. Retroactive enrollments using TRICARE from 6/1/2024 and forward will require an approved CalHR appeal. Retroactive enrollments for the CoBen Cash Option that were previously rejected for using TRICARE prior to 6/1/2024 will not be considered.

Presenter: Monica Chavez

Contact: CoBen@calhr.ca.gov

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# Benefit Program Updates

- Program updates include:
  - Vision [Vision@calhr.ca.gov](mailto:Vision@calhr.ca.gov)

  - FlexElect [FlexElect@calhr.ca.gov](mailto:FlexElect@calhr.ca.gov)

  - Coben [Coben@calhr.ca.gov](mailto:Coben@calhr.ca.gov)

  - Dental [Dental@calhr.ca.gov](mailto:Dental@calhr.ca.gov)

  - Pre-Tax Parking [Pre-TaxParking@calhr.ca.gov](mailto:Pre-TaxParking@calhr.ca.gov)

  - Long-Term Disability [LTD@calhr.ca.gov](mailto:LTD@calhr.ca.gov)

  - Life Insurance [LifeInsurance@calhr.ca.gov](mailto:LifeInsurance@calhr.ca.gov)

  - Group Legal [GroupLegal@calhr.ca.gov](mailto:GroupLegal@calhr.ca.gov)

Presenter: Monica Chavez

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# Affordable Care Act (ACA)

**Year End Reminders and Updates**

- All errors in the Affordable Care Act System (ACAS) must be corrected by **December 30, 2024**.

- The state may be subject to information reporting penalties for failure to file a correct information return with the Internal Revenue Service (IRS) and failure to furnish a correct 1095-C statement to employees.

Presenter: Lisa Hatten

Contact:
aca.policy@calhr.ca.gov

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# Affordable Care Act (ACA)

**Year End Reminders and Updates (cont'd)**

- Information Reporting Penalties up to **$660** for incorrect reporting for the 2024 Reporting Year

  - Failure to file a correct information return (1095-C) with the IRS: **$330**

  - Failure to furnish a correct employee statement (1095-C): **$330**

- **Reminder**: Departments will be responsible for 100% of any information penalties assessed for the 2025 reporting year.

Presenter: Lisa Hatten

Contact:
aca.policy@calhr.ca.gov

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# Affordable Care Act (ACA)

**ACA Training**

- The next ACA trainings are scheduled for:
  - Wednesday, October 23, from 9:00-10:30 a.m. (Part 1) and Thursday, October 24, from 9:00-12:00 p.m. (Part 2)

    AND

  - Wednesday, November 6, from 9:00-10:30 a.m. (Part 1) and Thursday, November 7, from 9:00-12:00 p.m. (Part 2)

- Departments can send an email to ppsdacatraining@sco.ca.gov to register for training.

- Additional training dates through the end of the year are available on the SCO's "Affordable Care Act Training" webpage.

Presenter: Lisa Hatten

Contact:
aca.policy@calhr.ca.gov

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# Affordable Care Act (ACA)

## ACAS Open Enrollment Transactions

- <u>Employee elected to cancel their health coverage during the 2024 Open Enrollment</u>: Key a 5B status code in ACAS, effective 12/31/2024 (to indicate the employee voluntarily cancelled their health coverage but remains eligible for health benefits)

- <u>Employee elected to enroll in health coverage during the 2024 Open Enrollment</u>: Key a 3A status code in ACAS, effective 1/1/2025 (to indicate the first of the month in which the employee's health coverage is effective)

**Note**: Departments should prioritize the correction of errors on the monthly ACAS compliance reports before entering updates from this year's Open Enrollment as these updates do not impact the state's ACA reporting for the 2024 reporting year.

Presenter: Lisa Hatten

Contact:
aca.policy@calhr.ca.gov

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# Dependent Re-Verification

Presenter: Alison Drummer

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# Dependent Re-Verification (DRV)

## What is DRV?

- The Dependent Re-Verification (DRV) is the process of re-verifying the eligibility of employees' spouses, domestic partners, children, stepchildren, and domestic partner children (family members) enrolled in state health, dental, and Premier Vision benefits. Departmental personnel offices are required to process re-verifications on a triennial basis.

- Government Code section 19815.9 mandates re-verifying the eligibility of these family members for health benefits. Government Code section 22959 authorizes extending this review to family members enrolled for dental and premier vision benefits. The bargaining unit contracts specify that family member eligibility for dental and vision benefits shall be the same as that prescribed for health benefits.

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

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# Dependent Re-Verification (DRV)

## DRV Program Highlights

- CalHR automated the DRV process for dental and Premier Vision effective January 2023.

- The current health Dependent Eligibility Verification (DEV) process through CalPERS and the MyCalPERS system will remain unchanged.

- Departmental personnel offices are required to update dental and Premier Vision DRV transactions through the Family Connect Portal (FCP).

- All state agencies must have an administrative account, who is at the supervisor or above class in the FCP to manage each agency's authorized user accounts to update DRV transactions.

- Department compliance with DRV regulation will be monitored and addressed by Health Benefit Officers and FCP Department Administrators.

Presenter: Alison Drummer

Contact:
DRV@calhr.ca.gov

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# Dependent Re-Verification (DRV)

**DRV Updates**

- [CalHR 781 Dependent Eligibility Checklist](#) and [CalHR 025 Affidavit of Parent-Child-Relationship](#) (dental/vision) have been updated to comply with CalPERS documentation revisions provided in the December 1, 2023, [Circular Letter #600-046-23](#), Eligibility Criteria for Dependents in a Parent-Child Relationship.

- CalHR has officially launched FCP Enhancements for Disabled Dependent and Parent-Child Relationship certifications.

  - Dependents enrolled in dental and/or Premier Vision only and require certification as a disabled dependent or PCR, will be certified by CalHR's DRV unit.

- The CAHP and CCPOA enrollment data in FCP is still pending.

**DRV Birth Month Cycle Updates**

- March, June, September, December 2023 and January, April, July, October, February 2024 birth month cycles: departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.

Presenter: Alison Drummer

Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

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# Dependent Re-Verification (DRV)

## DRV Birth Month Cycle Updates

- October 2024 birth month cycle: All notifications have been mailed and all alerts must be processed by the end of October in FCP for all employees who submitted their documents by September 30.

  - Please be sure to process these employees' DRV alerts in FCP before the end of October.

  - Note: DEV must be processed in myCalPERS by the 1st of the birth month to avoid the automatic deletion from health coverage.

- Please note all employees in a birth cycle will continue to receive DEV and DRV notices until their dependent verifications have been processed.

  - DRV mailings are scheduled to generate from FCP prior to the 15th of each mailing. All mailings are sent 90-, 60-, and 30-days prior of an employee's birth month.

- The next scheduled birth month cycle is February. The 90-day mailing will generate on or about October 15, 2024, and is scheduled to be mailed November 1, 2024, by the Department of General Services (DGS).

Presenter: Alison Drummer

Contact:
DRV@calhr.ca.gov

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# Dependent Re-Verification (DRV)

Presenter: Alison Drummer (DRV@calhr.ca.gov)

## Total Notices Mailed to Date

| Birth Month Cycle | 1st Notice - 90 days before end of birth month | Total Mailings of 1st Notice | 2nd Notice - 60 days before end of birth month | Total Mailings of 2nd Notice | 3rd Notice - 30 days before end of birth month | Total Mailings of 3rd Notice | Total Mailings |
|---|---|---|---|---|---|---|---|
| **March** | N/A | N/A | Jan-2023 | 8,523 | Feb-2023 | 8,219 | 16,742 |
| **June** | Mar-2023 | 8,462 | Apr-2023 | 7,511 | May-2023 | 6,365 | 22,338 |
| **September** | Jun-2023 | 9,822 | Jul-2023 | 8,325 | Aug-2023 | 6,582 | 24,729 |
| **December** | Sept-2023 | 8,523 | Oct-2023 | 8,379 | Nov-2023 | 6,711 | 23,613 |
| **January** | Oct-2023 | 8,330 | Nov-2023 | 7,929 | Dec-2023 | 6,475 | 22,734 |
| **April** | Jan-2024 | 8,196 | Feb-2024 | 7,862 | Mar-2024 | 6,254 | 22,312 |
| **July** | Apr-2024 | 8,783 | May-2024 | 8,230 | Jun-2024 | 7,942 | 24,955 |
| **October** | Jul-2024 | 9,018 | Aug-2024 | 8,511 | Sep-2024 | 6,501 | 24,030 |

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# Dependent Re-Verification (DRV)

Presenter: Alison Drummer ([DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov))

## Disabled Dependent Certification

# Dependent Re-Verification (DRV)

Presenter: Alison Drummer ([DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov))

**Disabled Dependent Certification**

# Dependent Re-Verification (DRV)

Presenter: Alison Drummer (DRV@calhr.ca.gov)

## Parent-Child Relationship Certification

# Dependent Re-Verification (DRV)

Presenter: Alison Drummer ([DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov))

## Parent-Child Relationship Certification

# Dependent Re-Verification (DRV)

**Contact**

- Before contacting the DRV Unit with policy and procedure related questions, please review all DRV resources including [BAM](#), [FCP Manual](#), and the [Human Resources Manual](#).

- Contact the DRV Unit at CalHR with questions and processes related to the Disabled Dependent and Parent Child Relationship benefits program for dependents enrolled in dental and/or Premier Vision benefits only.

- Departmental personnel offices can send DRV and FCP related questions via email to [DRV@calhr.ca.gov.](mailto:DRV@calhr.ca.gov)

- Current response time is five (5) business days.

Presenter: Alison Drummer

Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

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# Benefits Open Enrollment

Presenter: Bobby Saetern

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# Benefits Open Enrollment (OE)

**Open Enrollment Updates**

- The 2024 OE season ended on October 11, 2024.
- All changes made during the 2024 OE period will be effective January 1, 2025.

**Open Enrollment Listserv**

- To sign up for future OE information and updates, please subscribe to the OE subscription list on the HR Professionals webpage: State HR Professionals | Cal HR (benefitsprograms.info)
- Please encourage your employees to subscribe to the OE subscription list on the State Employees webpage: State Employees | Cal HR (benefitsprogram.info)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

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# Benefits Open Enrollment (OE)

## Open Enrollment Enhancements

- To help State HR Professionals succeed during Open Enrollment and make it easier for employees to understand their benefits, we are proud to announce the following resources through the Benefits website.

## State HR Professionals Benefits Toolkit

- The brand-new State HR Professionals Benefits Toolkit offers information for departmental personnel offices about Open Enrollment and benefits in one central platform.

## Benefits Summary Guide

- The updated Benefits Summary Guide provides descriptions of benefits options, enhancements and premiums all in one place so employees can make informed decisions during Open Enrollment.
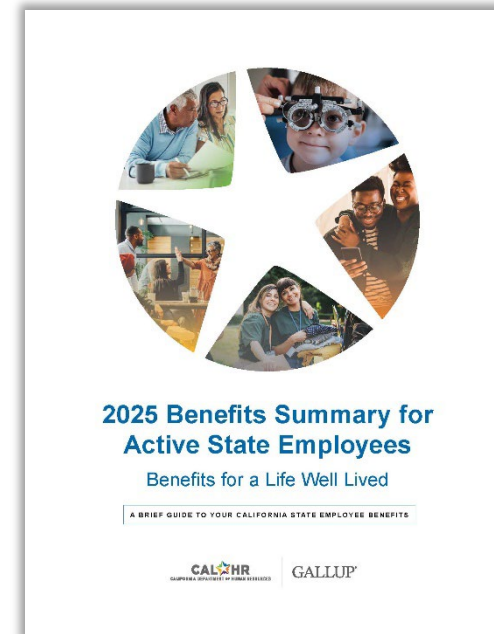
State HR Professionals Benefits Toolkit

VIEW TOOLKIT

2025 Benefits Summary for Active State Employees

Benefits for a Life Well Lived

A BRIEF GUIDE TO YOUR CALIFORNIA STATE EMPLOYEE BENEFITS

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Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

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# Benefits Open Enrollment (OE)

**Post Open Enrollment Surveys**

- Following the end of the 2024 Open Enrollment (OE) season, the CalHR OE Team has released a post-project survey to collect feedback regarding OE communication, events, and overall experience.

- Survey feedback is valued as we analyze and utilize the data to enhance the OE project each season. We encourage you to complete the survey for HR Professionals.

- We encourage you to send your employees the link to complete the survey for State Employees.

- The survey will remain open until Thursday, October 31, 2024.

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

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# Benefits Open Enrollment (OE)

**Contact**

- Departmental personnel offices can send OE related questions via email to [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov).
- Current response time is five (5) business days.

**Resources**

- [CalHR Benefits website](#)
- [CalHR Benefits Calculator](#)

Presenter: Bobby Saetern

Contact: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

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# Resources – CalHR Benefits Webpages

- Benefits Website
- State HR Professionals
- State HR Professionals Benefits Toolkit
- State HR Professionals OE Resources
- HR Manual
- Open Enrollment
- CalPERS Open Enrollment for Active Members
- Virtual Library
- Benefits Calculator
- State Employees

- Health
- Dental
- Vision
- Voluntary Benefits
- Consolidated Benefits (CoBen)
- FlexElect Reimbursement Account
- Life Insurance for Excluded Employees
- Group Legal Services
- Group Long-Term Disability Insurance (LTD)– Excluded Employees Only
- Work Engagement Resources

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# Resources – CalHR Benefits Contacts

- ACA Program ACA.Policy@calhr.ca.gov

- BAM Training BenefitsInquiries@calhr.ca.gov

- COBRA COBRA@calhr.ca.gov

- Dental Program dental@calhr.ca.gov

- Dependent Re-verification (DRV) Program DRV@calhr.ca.gov

- FlexElect Program FlexElect@calhr.ca.gov

- CoBen Program CoBen@calhr.ca.gov

- Group Legal Grouplegal@calhr.ca.gov

- Life Insurance LifeInsurance@calhr.ca.gov

- Long-Term Disability LTD@calhr.ca.gov

- Third Party Pre-Tax Parking Reimbursement Account Pre-TaxParking@calhr.ca.gov

- Vision/Dental Authorization Portal VisionDental.Authorization@calhr.ca.gov

- Vision Program vision@calhr.ca.gov

- Open Enrollment OpenEnrollment@calhr.ca.gov

- General Questions BenefitsInquiries@calhr.ca.gov

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# Affordable Care Act Program

Presenter: Steve Hallett

Contact: ACASupport@sco.ca.gov

**Completion of 2021 Corrected 1095-Cs and Updated 2021 1095-C Issued Report**

- All 2021 Corrected 1095-Cs have been mailed to qualifying employees who:
  - Received a corrected Form 1095-C
  - Received a new Form 1095-C
  - Received a letter stating their original Form 1095-C was voided

- ACA will send an official communication announcing the completion of the process upon the posting of the updated 2021 1095-C Issued report on ViewDirect and Mobius View
  - The 2021 1095-C Issued report will include records for employees who:
    - Had no changes to their original Form 1095-C
    - Received a corrected Form 1095-C
    - Received a new Form 1095-C
  - Employees whose Form 1095-C was voided will be removed from the report

# Affordable Care Act Program

Presenter: Steve Hallett

Contact: ACASupport@sco.ca.gov

**Reminders for the Upcoming Annual 2024 1095-C Process**

In preparation for the annual 1095-C process please be sure to:

- Correct all errors on ACA Compliance Reports before the end of the year
- Ensure employee addresses are current in the system
- Please reach out to acasupport@sco.ca.gov for assistance

# Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

**Open Enrollment Reminders**

- Complete all required sections on the form, including on cancels

- All dependents must be included on the enrollment forms, even if no action is occurring for them

- **Refrain from submitting duplicate forms**

- You do not need to "rescind" incorrect OE forms, just upload the "Corrected" version

- Write "Correction" at the top of any form submitted that is correcting a previous upload

- A cover sheet listing all employees (EE) is encouraged for batch uploads

- Use your resources, you got this!!

# Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

## Open Enrollment Form Counts
October 17, 2024

| Dental STD. 692 | FlexElect Cash Option STD. 701C | Consolidated Benefits Cash Option STD. 702 | FlexElect Reimbursement STD. 701R |
|---|---|---|---|
| Received ~ 7,030 | Received ~ 949 | Received ~ 392 | Received ~ 5,469 |
| Completed ~ 3,233 | Completed ~ 286 | Completed ~ 32 | Completed ~ 4,376 |

# STATEWIDE PROGRAM UPDATES

# Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDSTSP@sco.ca.gov

**Verification of Employees Identified as Nonresident Aliens:**

- Tax Support conducts a bi-annual verification, therefore if you filed a form for the first half of the year (January through June), you must also submit a form for the second half (July through December)
  - Personnel Letter #24-011
    - ➢ Released July 17, 2024
- The Nonresident Alien reports (PDW7170) are available on ViewDirect and Mobius View until December 31, 2024
- **ALL agencies/campuses** are required to submit the verification forms bi-annually, even if your agency/campus does not have any Nonresident Alien. Forms should be submitted on a flow basis to indicate any additions or deletions to the report.
  - Forms were **due by September 15, 2024**

# Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

**Deceased Employee and Designee/Beneficiary Reporting**

- Payroll Letter #24-012
  - o 2024 tax reporting year
    - ➢ Submit forms by December 6, 2024
    - ➢ Payroll Procedures Manual (PPM), Section I 902

- **Salary Advance Initial/Offset Reporting – Year End**
  - o Payroll Letter #24-013
  - o Form STD. 422 must be submitted throughout the year to comply.
    - ➢ Cut-off date is the **10th** of each month.
  - o Payroll Procedures Manual (PPM), Section N (103-11)

# Statewide Tax Support Program

Presenter: Monique Perez
Contact: PPSDW2MiscDED@sco.ca.gov

**Document Cut-off Dates for 2024 Calendar Year-End Processing**

- Payroll Letter #24-011

  o Released October 3, 2024

- Fringe Benefit reporting

  o November 8

- Nonresident Alien with Tax Treaty Exemption

  o December 6

- Labor Code (LC) 4800/LC 4811

  o December 13

- Salary Advance/Offsets

  o December 2

# Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

**Document Cut-off Dates for 2024 Calendar Year-End Processing**

- Form STD. 675

    o December 2

- Form STD. 995(A) and 995(R)

    o December 6

- Form PPSD21

    o December 4

**REMINDERS: Employees with Address Changes and Annual Withholding**

- Employees should review their withholdings every year if they have any of the following:

    o Spouse who works as an employee

    o Two or more jobs simultaneously

    o Worked partially during the year

    o Have dependents who are at least 17 years old

- For additional information, please refer to the STD. 686 Employee Action Request (EAR) links:

    o Personnel Action Manual (PAM): Section 6 - EAR Processing

    o QuickStart Guide and EAR Samples

# PPSD General Reminders

When you reconcile payroll, check that these *details* are correct:

- Withholdings and deductions

- Employer taxes

- Hours worked, including overtime, vacation time, sick days, etc.

- Wages and salaries

Make sure the numbers recorded are reasonable. Look at past payrolls to see if current pay period is similar. If there is a large difference, learn the cause. Then, make sure each transaction you entered is correct.

Resource: Payroll Procedures Manual (PPM) [Section M](#)

# PPSD General Reminders

- Utilize ConnectHR to submit documents or upload data

- Include the employee's complete social security number (SSN) when sending documents through ConnectHR

- Check Weekly Processing Dates before utilizing the Escalation Email process

- Update California Personnel Office Directory (CPOD)

- All HR Offices must promptly address all email messages that come through their Departmental Universal Email established with SCO

- The PPSD Register – PPSD's Monthly Newsletter

- Check out our recommended Human Resources subscriptions

- HR offices calling the Statewide Customer Contact Center (916-372-7200) must listen to the prompts carefully and patiently to select the appropriate program area who may best assist with their inquiry.

- Share this information with your Human Resources Team!

# SCO Resources

**Websites:**
- [Human Resources](#) (HR)
- [State Employees](#)

**SCO Key Initiatives:**
- [SCOConnect](#)
- [California State Payroll System Project](#)

**Contacts:**
- Affordable Care Act (ACA) Email [ACASupport@sco.ca.gov](mailto:ACASupport@sco.ca.gov)
- [Cal Employee Connect (CEC) Help and Feedback](#)
- [ConnectHR Help and Feedback](#)
- California Leave Accounting System (CLAS) Email [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)
- CS Escalation Email (HR Supervisors and Managers) [PPSDOps@sco.ca.gov](mailto:PPSDOps@sco.ca.gov)
- Decentralized Security Administration & ViewDirect Access (916) 619-7234 or [DSA@sco.ca.gov](mailto:DSA@sco.ca.gov)
- HR Suggestions Email (All HR Staff) [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov)
- Management Information Retrieval System (MIRS) Email [PPSDMIRS@sco.ca.gov](mailto:PPSDMIRS@sco.ca.gov)
- [Statewide Customer Contact Center (SCCC)](#) (916) 372-7200